

TENDER No.:	TIA002/2025
DESCRIPTION:	ORGANISATIONAL WORKSTUDY AND BUSINESS PROCESS MANAGEMENT TENDER
ADVERT DATE:	16 May 2025
MANDATORY BRIEFING SESSION:	Date: 30 May 2025 at 10:00am (Applicants to e-mail mapule.msiza@tia.org.za (not for tender submissions) - please write TIA002/2025 BRIEFING SESSION LINK on the subject line to request for the link). This will be via <u>Microsoft Teams</u> .
CLOSING TIME AND DATE	17 June 2025 at 11:00am
DELIVERY DETAILS:	<u>Electronic submissions: Tenders@tia.org.za</u> <i><u>Please note that our servers will block any file greater than 200MB. If your file is greater than 200MB, please divide your submission into parts that are equal or less than 200MB and state on the subject 'Part 1, Part2 or Part 3'.</u></i> <u>E.G. TIA002/2025 – PART 1 (on the subject line)</u>
REQUIRED TENDER VALIDITY:	120 days after closing date
CONTACT PERSON:	Mapule Msiza (mapule.msiza@tia.org.za – not for tender submissions) and state <u>TIA002/2025</u> on the subject line for enquiries about the tender
DURATION OF CONTRACT	12 Months



1. BACKGROUND

The Technology Innovation Agency (TIA) was established as a schedule 3A public entity under the provisions of the Public Finance Management Act (PFMA) (Act 1 of 1999, as amended by Act 29 of 1999). Its mandate is derived from the provisions of the Technology Innovation Agency Act (26 of 2008), which establishes the TIA as an agency that promotes the development and exploitation, in the public interest, of discoveries, inventions, innovations and improvements.

The TIA's objective is to support the state in stimulating and intensifying technological innovation with a view to improving economic growth and the quality of life of all South Africans by developing and exploiting technological innovations. While organisations achievements since inception are commendable, challenges have at times overshadowed its capacity to achieve even greater impact.

2. PURPOSE OF THE TENDER

- 2.1. The Agency is strategically repositioning itself for greater relevance, recognition, performance and impact. The repositioning process is driven by the newly developed TIA 2.0 Corporate Strategy, which is a ten-year strategic roadmap towards the Agency's improvement, growth, competitiveness, sustainability, and success.
- 2.2. TIA 2.0 is more than a mere evolution; it represents a paradigm shift in how the agency will operate, moving from a traditional role to one where it actively curates, leads, and stewards the innovation ecosystem. This new approach will focus on leveraging strategic partnerships, enhancing commercial success rates, and ensuring that innovation reaches every corner of the nation, especially those historically marginalized. As TIA embarks on this ambitious ten (10) year journey, the agency is committed to driving transformative change that aligns with the national priorities of reducing poverty, inequality, and unemployment, while positioning South Africa as a competitive player in the global innovation landscape.
- 2.3. To support this change, TIA requires a service provider to conduct the Work study and Business Process Management analysis to evaluate the current Operations, Work Methods, Business Processes, Human Resources capabilities, Systems and



Technologies to improve operational efficiency, optimise business processes and leveraging on digitilisation for overall effectiveness of the organisation.

3. SCOPE OF WORK

The successful bidder will be expected to undertake the following activities:

3.1. MANDATE AND STRATEGY

- 3.1.1. Understand the TIA mandate, objectives and the TIA 2.0 Corporate Strategy.
- 3.1.2. Comprehensive understanding of the TIA five (5) year Strategic Plan and Annual Performance Plan 2025/26.
- 3.1.3. Understanding of the TIA 2.0 Business Model.
- 3.1.4. Understanding of the TIA 2.0 Operating Model.
- 3.1.5. Understanding of relevant TIA Policies (e.g. Investment Framework Policy, Delegation of Authority Matrix and Policy).

3.2. ORGANISATIONAL DESIGN

- 3.2.1. Conduct an Organisational Design benchmarking study with organisations similar to TIA locally and internationally.
- 3.2.2. Assess and analyze the organization's current Human Resources capabilities and determine future capabilities and capacity in support of TIA 2.0 Operating Model. Determination between inhouse and outsourced models to be considered according to the TIA 2.0 Operating Model.
- 3.2.3. Advise and recommend on the TIA proposed Skills Workplan for the next 5 years aligned with TIA's Strategic Plan.
- 3.2.4. Assess and evaluate current work methods and determine future requirements along with employee workloads management strategies. Consideration must be given to TIA business dynamics, level of complexity in executing business tasks and turnaround times in line with TIA's Investment Value Chain and Programme processes.
- 3.2.5. Assess the current Organisational Design and newly envisaged Operating Model and recommend a fit for purpose Organisational Design and Structure in support of the TIA 2.0 Operating Model and Corporate Strategy.

3.3. BUSINESS PROCESS MANAGEMENT

- 3.3.1. Assess the efficiency of current Business Processes As-is (Investment Value Chain and Processes, Finance and Programmes).
- 3.3.2. Identification of process operational inefficiencies and gaps pertaining to bottlenecks, redundancies and duplications for optimisation to inform the To-be processes.
- 3.3.3. Conduct a benchmarking study on end-to-end processes with organisations similar to TIA locally and internationally.
- 3.3.4. Propose changes to improve productivity, reduce lead times, and improve customer satisfaction whilst meeting TIA policy and decision-making requirements.
- 3.3.5. Recommend To-be end-to-end business processes for respective Divisions and Units.

3.4. IT DIGITAL MATURITY ASSESSMENT

- 3.4.1. Conduct IT digital maturity assessment by evaluating current IT infrastructure and systems, related processes, and capabilities against leading practices to inform the new IT Strategy in support of the TIA. 2.0 Corporate Strategy and 5-year Strategic Plan.
- 3.4.2. Conduct a benchmark study on TIA's operational processes automation and digital transformation adoption against industry standards, peers, partners and NSI participants.
- 3.4.3. Identify automation opportunities or technology solutions that could enhance process performance and operational efficiency for the organisation.
- 3.4.4. Recommend functional systems for automation and integrations requirements.

3.5. CHANGE MANAGEMENT (not compulsory)

- 3.5.1. Recommend a Change Management Plan for implementation.
- 3.5.2. Oversee the implementation and management thereof.
- 3.5.3. Introduce frameworks and models for TIA to adapt for TIA 2.0 model.
- 3.5.4. Indicate requirements from TIA for the success and implementation of the Change Management Plan.

4. EXPECTED DELIVERABLES

The Outputs will include recommendations on:

- 4.1. Benchmark study report (s) conducted with similar organisations locally and internationally on Organisational Design, Business Process Management, and IT digital transformation.
- 4.2. Recommended fit for purpose Organisational Design and Structure in support of the TIA 2.0 Operating Model and Corporate Strategy.
- 4.3. TIA Workplace Skills Plan with clear skills and competency requirements classified according to Critical, Important and Necessary.
- 4.4. Identified TIA Human Resources capabilities required to deliver the mandate (combination of staff and outsourced including partnership models).
- 4.5. Recommended appropriate work methods and procedures with workload management considerations according to operational complexity and turnaround times assessed.
- 4.6. Proposal on optimal utilisation of human resources in alignment to the TIA 2.0 Operating and Business model.
- 4.7. Full assessment and evaluation of TIA Business processes and To-be optimized business processes recommended in line with work methods proposed (Full optimisation business report compiled, and Business Process Management methodologies recommended for maintenance).
- 4.8. Roadmap for enhancing digital transformation initiatives (identified gaps, revised IT business processes, automation and technology recommendation and proposed IT Strategy for the next 5 years).
- 4.9. Recommended Change management plan for the service provider to assist and oversee the implementation thereof (not compulsory as per section 3.5 above)
- 4.10. Project risk matrix to be mapped and with remedial actions recommended for implementation to mitigate risks.

5. SUBMISSION OF PROPOSALS

- 5.1. Service provider to submit a comprehensive proposal that details the Scope of Work above.
- 5.2. Provide a roadmap for implementing the recommended changes including a risk matrix.
- 5.3. Outline required resources, timelines, and milestones for implementation.
- 5.4. Identify key performance indicators (KPIs) for monitoring the effectiveness of the improvements.

6. PROJECT TIMELINES

- 6.1. The successful bidder will be expected to deliver the project and its milestones within twelve (12) months from appointment.

7. MANDATORY REQUIREMENTS

Failing to meet any of the following requirements will lead to the bidder being disqualified:

- 7.1. Provide company profile and individual CVs with copies of relevant qualifications and experience of the team members with necessary capacity to conduct the Work Study and Business Process Management assignment including IT Digital Maturity Assessment.
- 7.2. The Service provider team members should have minimum of 5+ years' individual experience in conducting Work Study, Business Process Management and IT Digital Maturity Assessment.
- 7.3. Provide a minimum of three (3) references letters that are not older than 5 years where Work Study, Business Process Management and IT Digital Maturity Assessment projects were undertaken. Service providers are expected to provide 3 reference letters per area in the Scope of Work.
- 7.4. The Company/Service Provider are registered on the Central Supplier Database (CSD).
- 7.5. The Company/Service Provider are tax compliant by the time of appointment.
- 7.6. A compulsory briefing session to be attended by service providers that are interested in responding to the TORs.

8. TERMS AND CONDITIONS

The Respondent is responsible for all costs incurred in the preparation and submission of the proposal.

Kindly note that TIA is entitled to:

- Amend any TOR conditions, validity period, specifications, or extend the closing date and/or time of RFQs before the closing date. All Respondents, to whom the RFQ documents have been issued, will be advised in writing of such amendments in good time;
- Verify any information contained in a proposal;
- Not to appoint any bidder;



- Vary, alter, and/or amend the terms of this RFQ, at any time prior to the finalisation of its adjudication hereof;
- An omission to disclose material information, a factual inaccuracy, and/or a misrepresentation of fact may result in the disqualification of a proposal, or cancellation of any subsequent contract.
- TIA reserves the right not to accept the lowest proposal or any proposal in part or in whole. TIA normally awards the contract to the Bidder who proves to be fully capable of handling the contract and whose Proposal is technically acceptable and/or financially advantageous to TIA. Appointment as a successful contractor shall be subject to the parties agreeing to mutually acceptable contractual terms and conditions. In the event of the parties failing to reach such agreement within thirty (30) days from the appointment date, TIA shall be entitled to appoint the contractor who was rated second, and so on.
- TIA also reserves the right to award this RFQ as a whole or in part without furnishing reasons.
- TIA also reserves the right to cancel or withdraw from this RFQ as a whole or in part without furnishing reasons and without attracting any liability.
- The Bidder hereby offers to render all of the services described in the attached documents (if any) to TIA on the terms and conditions and in accordance with the specifications stipulated in this RFQ documents (and which shall be taken as part of, and incorporated into, this proposal at the prices inserted therein).
- This proposal and its acceptance shall be subject to the terms and conditions contained in this RFQ document.
- The Respondent shall prepare for a possible presentation should TIA require such and the Respondent shall be notified thereof no later than 4 (four) days before the actual presentation date.
- Validity period: 120 days
- Failure to comply with any of the terms and conditions as set out above will invalidate the Proposal.
- TIA's decision on proposals received shall be final and binding

9. EVALUATION CRITERIA – FIRST PHASE

9.1. In addition to the requirements as stated, all proposals will be evaluated based on evaluation criteria below, and the 80/20 preferential point system.

No.	Evaluation criteria	Scoring guide	Weighting	Max score
9.1.1	Service provider's team experience: 5+ years' individual experience in conducting Work study and Business Process Management assignment, including IT Digital Maturity Assessment.	5 = 5+ years 0 = Less than 5 years' experience	0.50	5
9.1.2	References: Minimum of 3 Reference Letters / Work Orders not older than 5 years per area in the scope of work.	Details of previous work experience and a minimum of 3 Reference Letters / work orders with contactable references, per area in the scope of work must be attached. 5 = 5 references and more, 4 = 4 references, 3 = 3 references, 0 = 2 or less references.	0.25	5
9.1.3	CVs submitted with copies of relevant qualifications and certificates pertaining to Work Study and Business Process Management assignment, including IT Digital Maturity Assessment.	Team members CV's containing copies of qualifications and certificates relevant to the project scope. 5 = CVs submitted with copies of relevant qualifications and certificates covering indicated scope of work. 0 = No CV's submitted or qualifications/certificates /previous jobs not relevant	0.25	5

No.	Evaluation criteria	Scoring guide	Weighting	Max score
Maximum possible score / Total weight score			1	
Minimum qualifying weighted score (expressed as percentage)				70%

10. EVALUATION CRITERIA – SECOND PHASE

- 10.1. All shortlisted service providers who have successfully completed Phase I **(by meeting minimum qualifying score of 70%)** the evaluation criteria will be expected to do a presentation to TIA on the proposal submitted.
- 10.2. Invitations will be sent to these prospective bidders with date and time of the presentation.
- 10.3. All presentations will be evaluated based on evaluation criteria below:

No.	Evaluation criteria	Scoring guide	Weighting	Max score
10.1.1	Demonstrate clear understanding of the scope of the Terms of Reference and presented to TIA with best practices and methodologies applicable in delivering the project.	5 = Excellent; 4 = Good, 3 = Acceptable; 2 = Poor; 1 = Very Poor; 0 = Unacceptable	0.50	5
10.1.2	Understanding of project objectives and deliverables based on presenting a project plan with deliverables and timeframes, linked to all the sections of the Scope of Work.	5 = Excellent; 4 = Good, 3 = Acceptable; 2 = Poor; 1 = Very Poor; 0 = Unacceptable	0.50	5
Maximum possible score / Total weight score			1	
Minimum qualifying weighted score (expressed as percentage)				70%

NB: The minimum qualifying score (expressed as percentage) for presentations is 70%. Presentations that fail to meet the minimum qualifying score will not proceed to the 80/20 preferential point system.

11. SERVICE AND PRICING

11.1	Pricing Calculation		
Description	Duration	Hours per month	Price
1. Organisational Design			
2. Business Process Management			
3. IT Digital Maturity Assessment			
4. Change Management (not compulsory)			
Overall Total inclusive of VAT			

12. SPECIFIC GOALS

Specific Goal	Points	Proof
At least 51% Black ownership	10	Central Supplier Database report / Share register
Less than 51% Black ownership	0	
At least 51% Black Women ownership	10	Central Supplier Database report / Share register
Less than 51% Black Women ownership	0	
Total points for specific goals	20	
Price	80	Quotation
Total	100	

SBD1: PART A

INVITATION TO BID

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE (NAME OF DEPARTMENT/ PUBLIC ENTITY)					
BID NUMBER:		CLOSING DATE:		CLOSING TIME:	
DESCRIPTION					
BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT (STREET ADDRESS)					
BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO			TECHNICAL ENQUIRIES MAY BE DIRECTED TO:		
CONTACT PERSON		CONTACT PERSON			
TELEPHONE NUMBER		TELEPHONE NUMBER			
FACSIMILE NUMBER		FACSIMILE NUMBER			
E-MAIL ADDRESS		E-MAIL ADDRESS			
SUPPLIER INFORMATION					
NAME OF BIDDER					
POSTAL ADDRESS					
STREET ADDRESS					
TELEPHONE NUMBER	CODE		NUMBER		

CELLPHONE NUMBER					
FACSIMILE NUMBER	CODE		NUMBER		
E-MAIL ADDRESS					
VAT REGISTRATION NUMBER					
SUPPLIER COMPLIANCE STATUS	TAX COMPLIANCE SYSTEM PIN:		OR	CENTRAL SUPPLIER DATABASE No:	MAAA
B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE	TICK APPLICABLE BOX] <input type="checkbox"/> Yes <input type="checkbox"/> No		B-BBEE STATUS LEVEL SWORN AFFIDAVIT		[TICK APPLICABLE BOX] <input type="checkbox"/> Yes <input type="checkbox"/> No
[A B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE/ SWORN AFFIDAVIT (FOR EMES & QSEs) MUST BE SUBMITTED IN ORDER TO QUALIFY FOR PREFERENCE POINTS FOR B-BBEE]					
ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES /WORKS OFFERED?	<input type="checkbox"/> Yes <input type="checkbox"/> No [IF YES ENCLOSE PROOF]		ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES /WORKS OFFERED?		<input type="checkbox"/> Yes <input type="checkbox"/> No [IF YES, ANSWER THE QUESTIONNAIRE BELOW]
QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS					
IS THE ENTITY A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)? <input type="checkbox"/> YES <input type="checkbox"/> NO					



DOES THE ENTITY HAVE A BRANCH IN THE RSA?

☐ YES ☐ NO

DOES THE ENTITY HAVE A PERMANENT ESTABLISHMENT IN THE RSA?

☐ YES ☐ NO

DOES THE ENTITY HAVE ANY SOURCE OF INCOME IN THE RSA?

☐ YES ☐ NO

IS THE ENTITY LIABLE IN THE RSA FOR ANY FORM OF TAXATION?

☐ YES ☐ NO

IF THE ANSWER IS "NO" TO ALL OF THE ABOVE, THEN IT IS NOT A REQUIREMENT TO REGISTER FOR A TAX COMPLIANCE STATUS SYSTEM PIN CODE FROM THE SOUTH AFRICAN REVENUE SERVICE (SARS) AND IF NOT REGISTER AS PER 2.3 BELOW.

PART B

TERMS AND CONDITIONS FOR BIDDING

1. BID SUBMISSION:

- 1.1. BIDS MUST BE DELIVERED BY THE STIPULATED TIME TO THE CORRECT ADDRESS. LATE BIDS WILL NOT BE ACCEPTED FOR CONSIDERATION.
- 1.2. ALL BIDS MUST BE SUBMITTED ON THE OFFICIAL FORMS PROVIDED–(NOT TO BE RE-TYPED) OR IN THE MANNER PRESCRIBED IN THE BID DOCUMENT.
- 1.3. THIS BID IS SUBJECT TO THE PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT, 2000 AND THE PREFERENTIAL PROCUREMENT REGULATIONS, 2017, THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER SPECIAL CONDITIONS OF CONTRACT.
- 1.4. THE SUCCESSFUL BIDDER WILL BE REQUIRED TO FILL IN AND SIGN A WRITTEN CONTRACT FORM (SBD7).

2. TAX COMPLIANCE REQUIREMENTS

- 2.1 BIDDERS MUST ENSURE COMPLIANCE WITH THEIR TAX OBLIGATIONS.
- 2.2 BIDDERS ARE REQUIRED TO SUBMIT THEIR UNIQUE PERSONAL IDENTIFICATION NUMBER (PIN) ISSUED BY SARS TO ENABLE THE ORGAN OF STATE TO VERIFY THE TAXPAYER'S PROFILE AND TAX STATUS.
- 2.3 APPLICATION FOR TAX COMPLIANCE STATUS (TCS) PIN MAY BE MADE VIA E-FILING THROUGH THE SARS WEBSITE WWW.SARS.GOV.ZA.
- 2.4 BIDDERS MAY ALSO SUBMIT A PRINTED TCS CERTIFICATE TOGETHER WITH THE BID.
- 2.5 IN BIDS WHERE CONSORTIA / JOINT VENTURES / SUB-CONTRACTORS ARE INVOLVED, EACH PARTY MUST SUBMIT A SEPARATE TCS CERTIFICATE / PIN / CSD NUMBER.
- 2.6 WHERE NO TCS PIN IS AVAILABLE BUT THE BIDDER IS REGISTERED ON THE CENTRAL SUPPLIER DATABASE (CSD), A CSD NUMBER MUST BE PROVIDED.
- 2.7 NO BIDS WILL BE CONSIDERED FROM PERSONS IN THE SERVICE OF THE STATE, COMPANIES WITH DIRECTORS WHO ARE PERSONS IN THE SERVICE



OF THE STATE, OR CLOSE CORPORATIONS WITH MEMBERS PERSONS IN THE SERVICE OF THE STATE.”

NB: FAILURE TO PROVIDE / OR COMPLY WITH ANY OF THE ABOVE PARTICULARS MAY RENDER THE BID INVALID.

SIGNATURE OF BIDDER:

.....

CAPACITY UNDER WHICH THIS BID IS SIGNED:

(Proof of authority must be submitted e.g., company resolution)

DATE:

.....

SBD 4 BIDDER'S DISCLOSURE

1. PURPOSE OF THE FORM

Any person (natural or juristic) may make an offer or offers in terms of this invitation to bid. In line with the principles of transparency, accountability, impartiality, and ethics as enshrined in the Constitution of the Republic of South Africa and further expressed in various pieces of legislation, it is required for the bidder to make this declaration in respect of the details required hereunder.

Where a person/s are listed in the Register for Tender Defaulters and / or the List of Restricted Suppliers, that person will automatically be disqualified from the bid process.

2. BIDDER'S DECLARATION

2.1 Is the bidder, or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest¹ in the enterprise, employed by the state? **YES/NO**

2.1.1 If so, furnish particulars of the names, individual identity numbers, and, if applicable, state employee numbers of sole proprietor/ directors / trustees / shareholders / members/ partners or any person having a controlling interest in the enterprise, in table below.

Full Name	Identity Number	Name of State institution

2.2 Do you, or any person connected with the bidder, have a relationship with any person who is employed by the procuring institution? **YES/NO**

¹ the power, by one person or a group of persons holding the majority of the equity of an enterprise, alternatively, the person/s having the deciding vote or power to influence or to direct the course and decisions of the enterprise.

2.2.1 If so, furnish particulars:

.....
.....

2.3 Does the bidder or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest in the enterprise have any interest in any other related enterprise whether or not they are bidding for this contract? **YES/NO**

2.3.1 If so, furnish particulars:

.....
.....

3. DECLARATION

I, the undersigned, (name)..... in submitting the accompanying bid, do hereby make the following statements that I certify to be true and complete in every respect:

- 3.1 I have read, and I understand the contents of this disclosure;
- 3.2 I understand that the accompanying bid will be disqualified if this disclosure is found not to be true and complete in every respect;
- 3.3 The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor. However, communication between partners in a joint venture or consortium² will not be construed as collusive bidding.
- 3.4 In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications, prices, including methods, factors or formulas used to calculate prices, market allocation, the intention or decision to submit or not to submit the bid, bidding with the intention not to win the bid and conditions or delivery particulars of the products or services to which this bid invitation relates.
- 3.4 The terms of the accompanying bid have not been, and will not be, disclosed by the bidder, directly or indirectly, to any competitor, prior to the date and time of the official

² Joint venture or Consortium means an association of persons for the purpose of combining their expertise, property, capital, efforts, skill and knowledge in an activity for the execution of a contract.



bid opening or of the awarding of the contract.

- 3.5 There have been no consultations, communications, agreements or arrangements made by the bidder with any official of the procuring institution in relation to this procurement process prior to and during the bidding process except to provide clarification on the bid submitted where so required by the institution; and the bidder was not involved in the drafting of the specifications or terms of reference for this bid.
- 3.6 I am aware that, in addition and without prejudice to any other remedy provided to combat any restrictive practices related to bids and contracts, bids that are suspicious will be reported to the Competition Commission for investigation and possible imposition of administrative penalties in terms of section 59 of the Competition Act No 89 of 1998 and or may be reported to the National Prosecuting Authority (NPA) for criminal investigation and or may be restricted from conducting business with the public sector for a period not exceeding ten (10) years in terms of the Prevention and Combating of Corrupt Activities Act No 12 of 2004 or any other applicable legislation.

I CERTIFY THAT THE INFORMATION FURNISHED IN PARAGRAPHS 1, 2 and 3 ABOVE IS CORRECT.

I ACCEPT THAT THE STATE MAY REJECT THE BID OR ACT AGAINST ME IN TERMS OF PARAGRAPH 6 OF PFMA SCM INSTRUCTION 03 OF 2021/22 ON PREVENTING AND COMBATING ABUSE IN THE SUPPLY CHAIN MANAGEMENT SYSTEM SHOULD THIS DECLARATION PROVE TO BE FALSE.

.....
Signature

.....
Date

.....
Position

.....
Name of bidder

SBD 6.1

PREFERENCE POINTS CLAIM FORM IN TERMS OF THE PREFERENTIAL PROCUREMENT REGULATIONS 2022

This preference form must form part of all tenders invited. It contains general information and serves as a claim form for preference points for specific goals.

NB: BEFORE COMPLETING THIS FORM, TENDERERS MUST STUDY THE GENERAL CONDITIONS, DEFINITIONS AND DIRECTIVES APPLICABLE IN RESPECT OF THE TENDER AND PREFERENTIAL PROCUREMENT REGULATIONS, 2022

1. GENERAL CONDITIONS

1.1 The following preference point systems are applicable to invitations to tender:

- the 80/20 system for requirements with a Rand value of up to R50 000 000 (all applicable taxes included); and
- the 90/10 system for requirements with a Rand value above R50 000 000 (all applicable taxes included).

1.2 To be completed by the organ of state

(delete whichever is not applicable for this tender).

- a) The applicable preference point system for this tender is the 90/10 preference point system.
- b) The applicable preference point system for this tender is the 80/20 preference point system.
- c) Either the 90/10 or 80/20 preference point system will be applicable in this tender. The lowest/ highest acceptable tender will be used to determine the accurate system once tenders are received.

1.3 Points for this tender (even in the case of a tender for income-generating contracts) shall be awarded for:

- (a) Price; and
- (b) Specific Goals.

1.4 To be completed by the organ of state:

The maximum points for this tender are allocated as follows:

	POINTS
PRICE	80
SPECIFIC GOALS	20
Total points for Price and SPECIFIC GOALS	100

- 1.5 Failure on the part of a tenderer to submit proof or documentation required in terms of this tender to claim points for specific goals with the tender, will be interpreted to mean that preference points for specific goals are not claimed.
- 1.6 The organ of state reserves the right to require of a tenderer, either before a tender is adjudicated or at any time subsequently, to substantiate any claim in regard to preferences, in any manner required by the organ of state.

2. DEFINITIONS

- (a) **“tender”** means a written offer in the form determined by an organ of state in response to an invitation to provide goods or services through price quotations, competitive tendering process or any other method envisaged in legislation;
- (b) **“price”** means an amount of money tendered for goods or services, and includes all applicable taxes less all unconditional discounts;
- (c) **“rand value”** means the total estimated value of a contract in Rand, calculated at the time of bid invitation, and includes all applicable taxes;
- (d) **“tender for income-generating contracts”** means a written offer in the form determined by an organ of state in response to an invitation for the origination of income-generating contracts through any method envisaged in legislation that will result in a legal agreement between the organ of state and a third party that produces revenue for the organ of state, and includes, but is not limited to, leasing and disposal of assets and concession contracts, excluding direct sales and disposal of assets through public auctions; and
- (e) **“the Act”** means the Preferential Procurement Policy Framework Act, 2000 (Act No. 5 of 2000).

3. FORMULAE FOR PROCUREMENT OF GOODS AND SERVICES

3.1. POINTS AWARDED FOR PRICE

3.1.1. THE 80/20 OR 90/10 PREFERENCE POINT SYSTEMS

A maximum of 80 or 90 points is allocated for price on the following basis:

80/20	or	90/10
$P_s = 80 \left(1 - \frac{P_t - P_{min}}{P_{min}} \right)$	or	$P_s = 90 \left(1 - \frac{P_t - P_{min}}{P_{min}} \right)$

Where

P_s = Points scored for price of tender under consideration
 P_t = Price of tender under consideration
 P_{min} = Price of lowest acceptable tender

3.2. FORMULAE FOR DISPOSAL OR LEASING OF STATE ASSETS AND INCOME GENERATING PROCUREMENT

3.2.1. POINTS AWARDED FOR PRICE

A maximum of 80 or 90 points is allocated for price on the following basis:

80/20	or	90/10
$P_s = 80 \left(1 + \frac{P_t - P_{max}}{P_{max}} \right)$	or	$P_s = 90 \left(1 + \frac{P_t - P_{max}}{P_{max}} \right)$

Where

P_s = Points scored for price of tender under consideration
 P_t = Price of tender under consideration
 P_{max} = Price of highest acceptable tender

4. POINTS AWARDED FOR SPECIFIC GOALS

- 4.1 In terms of Regulation 4(2); 5(2); 6(2) and 7(2) of the Preferential Procurement Regulations, preference points must be awarded for specific goals stated in the tender. For the purposes of this tender the tenderer will be allocated points based on the goals stated in table 1 below as may be supported by proof/ documentation stated in the conditions of this tender:
- 4.2 In cases where organs of state intend to use Regulation 3(2) of the Regulations, which states that, if it is unclear whether the 80/20 or 90/10 preference point system applies, an organ of state must, in the tender documents, stipulate in the case of—

- (a) an invitation for tender for income-generating contracts, that either the 80/20 or 90/10 preference point system will apply and that the highest acceptable tender will be used to determine the applicable preference point system: or
- (b) any other invitation for tender, that either the 80/20 or 90/10 preference point system will apply and that the lowest acceptable tender will be used to determine the applicable preference point system, then the organ of state must indicate the points allocated for specific goals for both the 90/10 and 80/20 preference point system.

Table 1: Specific goals for the tender and points claimed are indicated per the table below.

(Note to organs of state: Where either the 90/10 or 80/20 preference point system is applicable, corresponding points must also be indicated as such.

Note to tenderers: The tenderer must indicate how they claim points for each preference point system.)

The specific goals allocated points in terms of this tender	Number of points allocated (90/10 system) (To be completed by the organ of state)	Number of points allocated (80/20 system) (To be completed by the organ of state)	Number of points claimed (90/10 system) (To be completed by the tenderer)	Number of points claimed (80/20 system) (To be completed by the tenderer)
At least 51% Black ownership		10		
Less than 51% Black ownership		0		
At least 51% Black Women ownership		10		
Less than 51% Black Women ownership		0		

5. DECLARATION WITH REGARD TO COMPANY/FIRM

5.1 Name of company/firm.....

5.2 Company registration number:

5.3 TYPE OF COMPANY/ FIRM

- ☐ Partnership/Joint Venture / Consortium
- ☐ One-person business/sole propriety
- ☐ Close corporation
- ☐ Public Company
- ☐ Personal Liability Company
- ☐ (Pty) Limited
- ☐ Non-Profit Company
- ☐ State Owned Company

[TICK APPLICABLE BOX]

5.4 I, the undersigned, who is duly authorised to do so on behalf of the company/firm, certify that the points claimed, based on the specific goals as advised in the tender, qualifies the company/ firm for the preference(s) shown and I acknowledge that:

- i) The information furnished is true and correct;
- ii) The preference points claimed are in accordance with the General Conditions as indicated in paragraph 1 of this form;
- iii) In the event of a contract being awarded as a result of points claimed as shown in paragraphs 1.4 and 4.2, the contractor may be required to furnish documentary proof to the satisfaction of the organ of state that the claims are correct;
- iv) If the specific goals have been claimed or obtained on a fraudulent basis or any of the conditions of contract have not been fulfilled, the organ of state may, in addition to any other remedy it may have –
 - (a) disqualify the person from the tendering process;
 - (b) recover costs, losses or damages it has incurred or suffered as a result of that person's conduct;
 - (c) cancel the contract and claim any damages which it has suffered as a result of having to make less favourable arrangements due to such cancellation;
 - (d) recommend that the tenderer or contractor, its shareholders and



- directors, or only the shareholders and directors who acted on a fraudulent basis, be restricted from obtaining business from any organ of state for a period not exceeding 10 years, after the *audi alteram partem* (hear the other side) rule has been applied; and
- (e) forward the matter for criminal prosecution, if deemed necessary.

.....
SIGNATURE(S) OF TENDERER(S)

SURNAME AND NAME:

DATE:

ADDRESS:

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